



### Key messages:

- **It's quick:** Check the status of your individual federal income tax refund anytime, from anywhere.
- **It's easy:** Enter your personal identification information — your Social Security number, filing status, and refund amount from your return.
- **It's safe:** Interact online with the IRS through secure technology that protects the confidentiality of your personal information.
- **It's improved:** You can now trace your refund check or change your address with IRS online in case your refund check is returned as undeliverable.

(Revised 2/18/05)

### New IRS service provides online refund information

Taxpayers can quickly go online and check the status of their individual federal income tax refunds. New features allow taxpayers to trace their lost refund check and update their new or incorrect address if their check was returned to the IRS by the Postal Service online. *Where's My Refund?* — at [www.irs.gov](http://www.irs.gov) — is the first IRS web-based service giving taxpayers direct access to their personal tax account information.

Taxpayers without Internet access can get the same information by calling IRS's new refund hotline at 1-800-829-1954 or using IRS's automated refund service at 1-800-829-4477.

### *Where's My Refund? is quick*

Taxpayers can quickly check the status of their individual federal income tax refunds with just a few keystrokes — anytime, from anywhere. *Where's My Refund?* is self-service — at taxpayers' convenience 24 hours a day, 7 days a week, worldwide.

### *Where's My Refund? is easy*

Taxpayers access their individual refund information by entering personal identification information. Taxpayers must enter three personal identifiers — personal information known only by the taxpayer and IRS:

- The taxpayer's Social Security number (SSN) (joint filers may use either Social Security Number) or Individual Taxpayer Identification Number (ITIN);
- The taxpayer's filing status; and
- The exact whole dollar amount of the refund from the tax return.

### *Where's My Refund? is safe*

Taxpayers interact online with the IRS through secure technology that protects the confidentiality of their personal information.

Internal Revenue Service

# TALKPOINTS

## *Where's My Refund?— New IRS.gov service*



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### ***Where's My Refund? is safe*** *(continued)*

*Where's My Refund?* was extensively tested to meet strict IRS security and privacy certifications.

Taxpayers can avoid unsuccessful attempts by entering personal identification information *exactly* as shown on their individual federal income tax returns.

To ensure privacy, IRS requires taxpayers to enter personal identification information (SSN, filing status, exact refund amount) to verify they are authorized to access those accounts. *Where's My Refund?* uses temporary or "session" cookies — not permanent cookies — to ensure IRS accesses the correct account information. The cookie is deleted once the transaction is completed.

### ***Where's My Refund? is improved***

Taxpayers can now trace lost or missing refund checks and can notify IRS of address changes in case of an undeliverable refund check online. It's simple! Go to [www.irs.gov](http://www.irs.gov) and click on *Where's My Refund*. The improvements are part of IRS' modernization and burden reduction efforts, allowing taxpayers direct and convenient access to their refund information and enabling them to correct problems online. The "step-by-step" process is easy but there are a few important things to note:

- Taxpayers can initiate an online refund trace 28 days after the IRS mailing date provided on the web application.
- Taxpayers who filed **Married, Filing Joint**, must complete Form 3911, Taxpayer Statement Regarding Refund. This form can be completed online but must be mailed or faxed to the IRS. Both spouses' signatures are required. It is not required for all other filing statuses.
- All taxpayers will receive a claims package from the Financial Management Services in the mail to complete and return before the trace action can be initiated.
- If the taxpayer's refund check was undeliverable, the IRS will re-issue the check to the new or corrected address **automatically** if the tax account meets very stringent tests and the taxpayer is able to provide one of the following additional pieces of information from their tax return - adjusted gross income, taxable income, total credits or total tax.

Internal Revenue Service

# TALKPOINTS

## *Where's My Refund?— New IRS.gov service*



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### **Equal access to all taxpayers (continued)**

Where's My Refund? was developed to conform with the provisions of the Section 508 amendments to the Rehabilitation Act of 1973. It provides equal access to people with disabilities, who may use assisting technology, as those without disabilities.

### **How *Where's My Refund?* work?**

A link to *Where's My Refund?* is located on the first page of [irs.gov](http://irs.gov). Easy online instructions and prompts guide taxpayers. Search results include information about:

- Returns received and in processing;
- Returns received and under review;
- The mailing dates or direct deposit dates of refunds;
- Mistakes that change the amount of refunds;
- Refund offsets to other government agencies;
- Processing delays due to other tax liabilities, SSN mismatches, etc; and
- Undeliverable refunds returned to IRS.

The search results also include links to helpful information, such as appeal rights, and next steps if the taxpayer's refund is delayed due to problems on the tax return.

*Where's My Refund?* contain information on refund returns only, i.e., taxpayers filing returns with balances due or credit-elects cannot obtain information.

### ***Information is updated daily***

*Where's My Refund?* information is updated daily and taxpayers can virtually track their tax returns via the Internet as the returns are received, processed, and refunds are issued. However, to protect the security of confidential taxpayer information, *Where's My Refund?* is not connected directly to IRS mainframe computers and information is not displayed in real-time. E-filers may notice a 12- to 24-hour time lag between the time IRS acknowledges receipt of an electronic return and the time receipt information is posted. (The delay could extend to 48 hours on weekends.)

For example, a taxpayer could receive an acknowledgement that IRS accepted his/her e-filed return, but *Where's My Refund?* will not reflect the receipt until the next day. Taxpayers can check the service again the following day for the most current information.

Internal Revenue Service

# TALKPOINTS

## *Where's My Refund?— New irs.gov service*



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IRS projects the refund date using the best available information, but variances may occur due to the timing of direct deposits through the banking system and mail delivery for paper checks. Taxpayers may receive direct deposits on e-filed returns a few days earlier than the posted dates. Taxpayers checking their mailboxes for refunds may receive their checks a few days later.

Sample messages are:

*"We are sorry, we cannot provide any information about your refund. It can take up to 3 weeks to process your return. Please wait at least one week before you log-on again to check the status of your refund."* This message appears for all returns that have not progressed far enough in IRS processing for our system to provide a status. For e-filed returns, this message could appear up to 12 to 24 hours (or 48 hours on weekends) after taxpayers receive acknowledgements from their preparers, online transmitters, or the IRS.

*"You should receive your refund by (date)."* This is a projected date, providing there are no errors on the return or other delays. At this point, the return is in processing and the system does not differentiate between a direct deposit (faster) and paper check (slower). For e-filed returns, taxpayers should receive direct deposits the Friday before the projected date. E-filers expecting paper checks will receive their refunds a week after the projected date.

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